

R&A Quarterly Newsletter



November 2014, Issue 12

Information you can use to help retirees and annuitants!

Director's Message

Hello Everyone –

November has arrived and here near the Great Lakes it's time to get ready for winter. In Retired and Annuitant Pay, autumn means just one thing, that it's time to get ready for tax season – our busiest time of the year.

There are a lot of internal procedures we go through to close out our books and bring all our customers' pay accounts up to date so we can issue tax statements. But the most important part of preparation for tax season is communicating with our customers and pay partners. We want to help you assist members with tax information as quickly as possible, and that means we need your help to make sure members keep their accounts current.

There are a number of things members should do in preparation for tax season:

1. Make sure they have a myPay password.
2. Check their account in myPay to make sure their correspondence address and email address are correct and up to date.

3. Know when the 1099R becomes available online at myPay.
4. Know when the 1099R will arrive in the mail.
5. Know how to get additional copies of the 1099R if it gets misplaced.
6. Know where to look for updates and the latest news.
7. Know how to contact us if they have any issues they need to discuss.

This issue has all the information you need to assist members during the upcoming tax season. Please make sure you save a copy of this newsletter and keep it handy. It will be an important resource for you in the months to come.

Wishing you all the best!

Tom McKenna

Director, Retired and Annuitant Pay

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Important!

Except where otherwise noted, the articles in this newsletter are written for Retirement Services Officers and are not intended to be published or forwarded.

If you're working on a newsletter or other articles for release to military retirees, please contact Lou Burton, Public Affairs Specialist at 216-204-7089, for more information.

Why Members Should Have a myPay Account

The key to effective day-to-day management of retirement pay is creating and maintaining a myPay account. myPay is the most important tool for managing pay accounts. In addition, the email address entered into myPay is our primary way of staying in touch with the member and keeping them current. For retirees and annuitants, there is nothing more important than creating, using, and maintaining the security of their myPay account.

On top of all that, myPay recently added new features that make it an even more vital tool for military retirees and annuitants. There are:

- Verification of Pay
- Prior Year Tax Statements
- Pay Garnishment Documentation
- Verification of Pay

Getting the paperwork together for a loan application can get complicated, especially for mortgages and other high value loans that require verification of pay from our payroll office. This feature allows military retirees to easily download official pay verification statements without calling, mailing, or faxing requests to the Defense Finance and Accounting Service.

Prior Year Tax Statements

With an online myPay account, members can now access up to five years' worth of 1099Rs to help keep their personal, financial and legal concerns in order.

Pay Garnishments

Defaults on commercial loans or court-ordered support for former spouses and children can result in pay garnishments for any of the 6.6 million payroll customers of the Defense Finance and Accounting Service.

While the agency's Garnishment Operations division is tasked with ensuring each court order or instructions for DoD authorities are valid before starting involuntary pay deductions, individual customers may not have seen, or misplaced, the documents establishing their individual garnishments.

Commercial debt and spousal or child support orders will be available for 30 days only for military members, military retirees and federal civilian employees following the date the order/letter is received by myPay. Military members will also have access to Military Commercial Debt Orders for 90 days only from the date it is received by myPay.

Need Help Creating a myPay Account?

If a member has never created a myPay account, they can find complete instructions at <http://www.dfas.mil/retiredmilitary.html>

If a member has created a myPay account, but has problems remembering their login ID or password, they can access myPay's website at <https://mypay.dfas.mil/mypay.aspx>

If you would like an overview of the process before you assist members, you can access a video tutorial on resetting myPay passwords at:
http://www.youtube.com/watch?v=1zxXeVoQJVw&list=PLhx_8nsfXqVgcoJ9CH0r2uo5u_KgCJHs3

If a member requires personal attention, they can contact our Customer Care Center at

1-888-332-7411 Opt 5
Monday- Friday
8:00 a.m. to 5:00 p.m.
(Eastern Time)

Managing the myPay Password

Earlier this year, to align with the Department of Defense's modern security mandates, myPay introduced new, stronger password requirements. All myPay passwords now must:

- Be 9 to 30 characters in length
- Contain at least one UPPERCASE letter
- Contain at least one lowercase letter
- Contain at least one number (0-9)
- Contain at least one of the following special characters:
 - # (pound or number sign)
 - @ (at sign)
 - \$ (dollar sign)
 - = (equal sign)
 - + (plus sign)
 - % (percent sign)
 - ^ (caret)
 - ! (exclamation)
 - * (asterisk)
 - _ (underline/underscore)
- NOT include any spaces

Additionally, passwords will now expire every 150 days, requiring users to change their passwords at the end of that period.

Using myPay To Update Correspondence Addresses

If members choose to receive their 1099R in the mail, it's important to make sure the mailing address they have on file with myPay is current. If they have moved in the past year, or will be staying somewhere other than their primary residence when tax season begins, they should let us know by November 27, 2014, so we can send their tax documents to the correct address.

If they need to update the correspondence address they have on file with us, please make sure they also update their correspondence address with the U.S. Postal Service. They must do this themselves. We cannot do it for them. If the two addresses are not the same, it can create confusion and result in a misdirected 1099R.

The quickest and easiest way to update the mailing address we have on file is to use myPay (<https://mypay.dfas.mil/mypay.aspx>). To change a mailing address using myPay:

1. On the Main Menu page, click on the Correspondence Address link.
2. Enter the correct address.
3. Save your changes and confirm the changes you made are correct.
4. From the top of the page in the gray bar, you may select Main to return to the Main Menu or Exit to close out your session.

Members can also use our Change of Address Fast Form or send us a written request.

Fast Forms (<http://www.dfas.mil/retiredmilitary/forms.html>) are electronic versions of our paper forms. They are processed automatically, and they save paper and postage costs. Members will receive an email confirmation of their submission and their account will be updated in three to seven business days.

If members choose to mail or fax us a written request to change their address, they must include both their old and new mailing address along with the effective date for the new address. Additionally, the name, Social Security number and signature with the date should be on the request. It will take 30 to 60 days for us to process a written request.

If you have more questions about how to change mailing addresses, you can access our video tutorial on address changes at:

http://www.youtube.com/watch?v=hvS30aNU28E&list=PLhx_8nsfXqVhB9fkFUpcpXIERDHWQIwc

If you have questions about what other account information members need to keep current, and when it should be updated, you can access a video tutorial at:

http://www.youtube.com/watch?v=GmZywoPSMZo&list=PLhx_8nsfXqVhB9fkFUpcpXIERDHWQIwc

Updating Email Address

When members elect to receive their 1099R electronically and their email address has changed, it has to be updated in myPay by November 26, 2014. DFAS uses their myPay email address to send newsletters, breaking news and to notify them when their Retiree Account Statement and 1099R tax statements are available. To access the statements, follow the steps below:

1. Go to the myPay web site and log into your account using the “Log In” box at the top left-hand side of your screen.
2. After entering your Login ID and Password, click “I agree to the terms of the User Agreement.”
3. On the Main Menu page, click on the Email Address link.
4. Enter and confirm the correct address. Be sure to select “primary” beside the email address where you want to receive pay statement notifications and other important correspondence.
5. Save your changes by selecting Accept/Submit, then confirm your changes are correct.
6. From the top of the page in the gray bar you may select Main to return to the Main Menu or Exit to close out your session.

When Will The Form 1099R Become Available?

The IRS Forms 1099R for the 2014 tax year will become available online in mid-December 2014 and members will be able to access the forms through myPay.

We also mail hard copy versions of the 1099R to those members who have chosen that option. Please keep in mind that hard copy versions of the 1099R are issued later and will take a while to reach the member. If the member has elected hard copy, they may not receive it until mid-January 2015.

Please note that 1099Rs are not automatically issued for deceased members. If a beneficiary wants to receive a 1099R on the behalf of a member who passed away, a certificate of death must be on file and they must request that a 1099R be issued. To make this request, or have questions regarding a 1099R for a deceased member, please contact us using one of the methods described in this link:

<http://www.dfas.mil/dfas/retiredmilitary/about/aboutus/customer-service.html>

Feedback

Is there something you would like to see in our next issue? Let us know! You can contact us at our service.liaison@dfas.mil with your suggestions. Please attention all emails for newsletter suggestions to Tameka Smith.

Bests Ways to Get or Replace a Lost 1099R

Military retirees and annuitants receive a 1099R tax statement either electronically via myPay or as a paper copy in the mail each year. Members can also request additional copies of their 1099R tax statements in several different ways.

The fastest and most secure way to obtain a copy of the 1099R is myPay. Just login to myPay and print the 1099R out of the comfort of your own home

1. Go to <https://mypay.dfas.mil>
2. Enter the Login ID on the home page.
3. Enter the password.
4. Access the 1099R from the "Main Menu" by clicking on the "Tax Statement 1099R"

Not a myPay user yet? Then the fastest and easiest way to get a copy of the 1099R, besides myPay, is to use our telephone self-service option. Telephone self service requests are logged instantly and are sent to the member's current address of record within three business days.

This can be used 24 hours a day, 7 days a week. There is no need to speak with a representative, wait on hold, or even use a computer for this system.

1. Call 800-321-1080.
2. Select option 1 for Military Retired and Annuitant Pay.
3. Select option 1 "To use our automated self-service system."
4. Select option 1 to request your 1099R any time of day.



Best Ways to Get or Replace a Lost 1099R Continued...

5. Enter your Social Security Number when prompted.
6. Your 1099R should be in the mail within 3 days to your address we have on record.

If the member is not a myPay user, and the mailing address we have on file is out of date, the easiest quickest way to get the 1099R sent to an updated address is to submit the request through the internet. Members can update their mailing address, enter the email address, and request their 1099R be sent to the new address using one easy form. Their transaction will be logged instantly and it will be in the mail to you within 7 to 10 business days. The form can be found at:

<http://www.dfas.mil/retiredmilitary/manage/taxes/getting1099r/viaaskdfas.html>

If the member prefers traditional mail, they can send us a written request by fax or mail. Make sure they leave us time to reply as it takes us 30 to 60 days to process requests received by fax or mail. Find complete instructions at:

<http://www.dfas.mil/retiredmilitary/manage/taxes/getting1099r/viawrittenreq.html>

Members with unique situations can speak directly to one of our customer care representatives. Depending on call volume, they may have to wait on hold while we assist other customers. Call 800-321-1080.

DFAS Contact Information

MANAGER:

Lisa Cervantes

Email: lisa.cervantes@dfas.mil

Phone: 216-204-7132

ARMY: Jeffrey Meier

Email: jeffrey.meier@dfas.mil

Phone: 216-204-2137

AIR FORCE: Alex Machaskee

Email: alex.machaskee@dfas.mil

Phone: 216-204-3099

NAVY/MARINES: Timothy Jackson

Email: timothy.jackson@dfas.mil

Phone: 216-204-2461

Our email box is: service.liaison@dfas.mil

Please add it to your contacts

Pay Dates

Entitlement Month	Retiree Payment Dates	Annuitant Payment Dates
October 2014	Friday, Oct. 31, 2014	Monday, Nov. 3, 2014
November 2014	Monday, Dec. 1, 2014	Monday, Dec. 1, 2014
December 2014	Wednesday, Dec. 31, 2014	Friday, Jan. 2, 2015

Cutoff Dates

The following dates apply to the monthly operation of our pay system. These dates are the last day of the month to have changes made that will be effective for the following pay date.

October 21, 2014
November 18, 2014
December 11, 2014

2014 PayPers Workshop Highlights

This year's PayPers Conference featured a different format. In past years, the conference was structured in a traditional multiple briefing format, with speakers pushing information to attendees. In 2014, we moved to a more interactive workshop format. Workshops were focused on the needs of RSO's in the field, were built around dialogue, and gave all participants the opportunity to voice their views and express their priorities for the coming year.

The 2014 PayPers Conference received high marks overall from attendees in the post survey and attendees showed a particularly positive response to the new workshop format. Retired Pay takes survey results seriously, and we use the information taken from surveys to help guide future events and the way we communicate with our pay partners.

If you did not have an opportunity to participate in the 2014 PayPers Workshops, don't worry you can review the event with our PayPers notes and request a copy of the slides through the service.liaison@dfas.mil mailbox. If you would like more information about this event, please send us an email with "2014 PayPers Information Request" in the subject line

Following the PayPers Workshops attendees were asked to fill out a survey to provide feedback about their experience during the event. The survey results are as follows:

1. I am very satisfied with the organization and materials presented during the 2014 PayPers.

- Strongly Agree 61.29%
- Somewhat Agree 32.26%
- Neither Agree nor Disagree 6.45%

2. Did you take something away from PayPers that can help you provide better and more efficient services to our mutual customer?

- Yes 96.77%
- No 3.23%

3. Would you like to see more or fewer workshops in the future?

- More 81.48%
- Fewer 18.52%

2014 PayPers Workshop Highlights Continued...

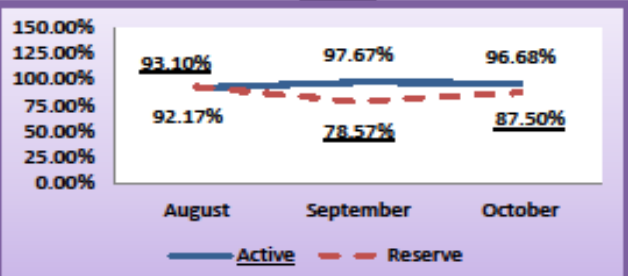
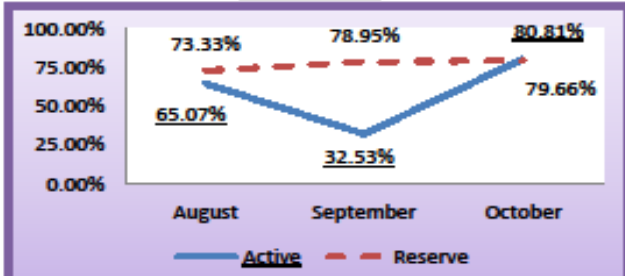
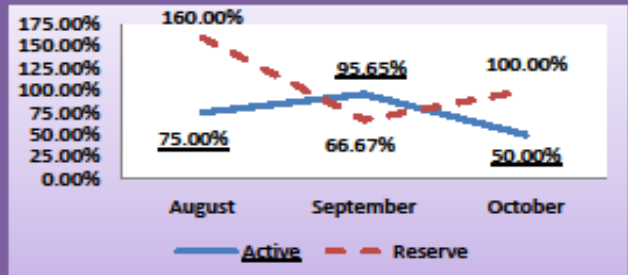
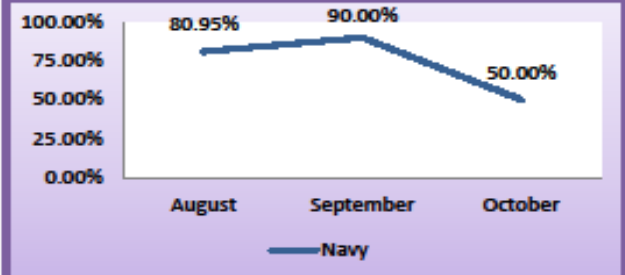
4. When would you like to see the next PayPers scheduled?

- June 2015 34.38%
- July 2015 15.63%
- August 2015 50.00%

5. What would you suggest or add to make the 2015 PayPers better able to meet your goals? **Please note not all comments were included in this newsletter**

- Discuss Wounded Warrior Pay Issues (Wounded, Ill, Injured).
- Opportunity for installation/base level retirement services offices to participate in one of the seminars via telnet or DCO
- I would say early to mid-June is the best time for the conference. July, people are on vacation and in August it's back to school and too close to the end of the fiscal year. I think if there is an opportunity for the Services to speak, that would be helpful.
- Get Wi-Fi in conference room.
- Ensure that any changes done are discussed first by the panel. Before handling other issues, also if possible recap any previous issues.
- No changes are necessary!
- How Retro/CCP is calculated and how DFAS works with the VA.
- More topics concerning medical retirees.
- Revisit rejects from Services and ways to improve; maybe discuss Green Belt projects and any opportunities for joint, albeit, long distance teams.
- Loved the new format, was very informative and interactive with much more participation.

Top Automated Retirement Authorization Errors per BOS (33) Aug 2014 - Oct 2014

<p align="center">ARMY</p>  <p>Y-axis: 0.00% to 150.00% X-axis: August, September, October Legend: Active (solid blue), Reserve (dashed red)</p>	<p align="center">AIR FORCE</p>  <p>Y-axis: 0.00% to 100.00% X-axis: August, September, October Legend: Active (solid blue), Reserve (dashed red)</p>
<p align="center">ACTIVE</p> <p>Rank</p> <ol style="list-style-type: none"> 03031: 1405 Svc may not be greater than Svc for Pay. 03007: Current grade effective date does not pass edits. 10040: Minimum active service requirement not met. <p align="center">RESERVE</p> <p>Rank</p> <ol style="list-style-type: none"> 10141: PEBD may not be prior to Service Entry Date. 02288: New Gain action matches completed account -- Duplicate Entry. 02282: Input name does not match name on dictionary. 	<p align="center">ACTIVE</p> <p>Rank</p> <ol style="list-style-type: none"> 10040: Minimum active service requirement not met. 03030: SVC-1405 does not pass the standard service edit. 10141: PEBD may not be prior to Service Entry Date. <p align="center">RESERVE</p> <p>Rank</p> <ol style="list-style-type: none"> 03049: Retirement eligibility date is after the Separation (Projected) effective date. 03018: SVC-1332 must be less than 200000 for reserve retirements. 03075: Application for Retirement date is after Retirement Separation (Projected) effective date.
<p align="center">MARINE CORPS</p>  <p>Y-axis: 0.00% to 175.00% X-axis: August, September, October Legend: Active (solid blue), Reserve (dashed red)</p>	<p align="center">NAVY</p>  <p>Y-axis: 0.00% to 100.00% X-axis: August, September, October Legend: Navy (solid blue)</p>
<p align="center">ACTIVE</p> <p>Rank</p> <ol style="list-style-type: none"> 03295: CSB must be 2 or 3 if DIEMS => 860801 & ACT-SVC is => 15 yrs. 03026: Service account does not pass standard edit. 03028: Service pay does not pass standard edit. <p align="center">RESERVE</p> <p>Rank</p> <ol style="list-style-type: none"> 03047: Retirement eligibility date is required on reserve retirements. 03119: 20 year qualification date is > retirement eligibility date in error. 02288: New Gain action matches completed account -- Duplicate Entry. 	<p align="center">NAVY</p> <p>Rank</p> <ol style="list-style-type: none"> 03295: CSB must be 2 or 3 if DIEMS => 860801 & ACT-SVC is => 15 yrs. 02288: New Gain action matches completed account -- Duplicate Entry. 03008: Current effective date of the Pay Grade is after the projected separation effective date. <p>* Error rates may exceed 100%. This is caused when a single account has rejected containing multiple errors. Note: A case with multiple errors will only reject once.</p>